

Employee Post-Travel Disclosure of Travel Expenses

Date/Time Stamp:

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Post-Travel Filing Instructions: Complete this form within 30 days of returning from travel. Submit all forms to the **Office of Public Records in 232 Hart Building.**

In compliance with Rule 35.2(a) and (c), I make the following disclosures with respect to travel expenses that have been or will be reimbursed/paid for me. I also certify that I have attached:

- ☒ The **original** *Employee Pre-Travel Authorization* (Form RE-1), **AND**
- ☒ A **copy** of the *Private Sponsor Travel Certification Form* with all attachments (itinerary, invitee list, etc.)

Private Sponsor(s) (list all): The Pew Charitable Trusts

Travel date(s): 9/15-9/17/2017

Name of accompanying family member (if any): n/a

Relationship to Traveler: ☐ Spouse ☐ Child

IF THE COST OF LODGING **DID NOT INCREASE** DUE TO THE ACCOMPANYING SPOUSE OR DEPENDENT CHILD, ONLY INCLUDE LODGING COSTS IN EMPLOYEE EXPENSES. (Attach additional pages if necessary.)

Expenses for Employee:

| | Transportation Expenses | Lodging Expenses | Meal Expenses | Other Expenses (Amount & Description) |
|---|-------------------------|------------------|---------------|---------------------------------------|
| <input type="checkbox"/> Good Faith Estimate | \$23.53 | \$286.00 | \$128.00 | |
| <input checked="" type="checkbox"/> Actual Amount | | | | |

Expenses for Accompanying Spouse or Dependent Child (if applicable):

| | Transportation Expenses | Lodging Expenses | Meal Expenses | Other Expenses (Amount & Description) |
|--|-------------------------|------------------|---------------|---------------------------------------|
| <input type="checkbox"/> Good Faith Estimate | n/a | n/a | n/a | n/a |
| <input type="checkbox"/> Actual Amount | | | | |

Provide a description of all meetings and events attended. See Senate Rule 35.2(c)(6). (Attach additional pages if necessary.):

please see attached agenda; all sessions attended.

(Date)

(Printed name of traveler)

(Signature of traveler)

TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER:

I have made a determination that the expenses set out above in connections with travel described in the *Employee Pre-Travel Authorization* form, are necessary transportation, lodging, and related expenses as defined in Rule 35.

(Date)

(Signature of Supervising Senator/Officer)

EMPLOYEE PRE-TRAVEL AUTHORIZATION

Pre-Travel Filing Instructions: Complete and submit this form at least 30 days prior to the travel departure date to the **Select Committee on Ethics** in SH-220. Incomplete and late travel submissions will **not** be considered or approved. This form **must** be typed and is available as a fillable PDF on the Committee's website at ethics.senate.gov. Retain a copy of your entire pre-travel submission for your required post-travel disclosure.

Name of Traveler: Kristen Gentile

Employing Office/Committee: Senator Bob Casey

Private Sponsor(s) (list all): The Pew Charitable Trusts

Travel date(s): 9/15-9/17/2017

*Note: If you plan to extend the trip for any reason you **must** notify the Committee.*

Destination(s): Richmond, VA

Explain how this trip is specifically connected to the traveler's official or representational duties:

This is a program for Senate Chiefs of Staff designed to further develop leadership and management skills and fostering bi-partisanship in the body.

Name of accompanying family member (if any): _____

Relationship to Employee: ☐ Spouse ☐ Child

I certify that the information contained in this form is true, complete and correct to the best of my knowledge:

8/10/17
(Date)

Kristen Gentile
(Signature of Employee)

TO BE COMPLETED BY SUPERVISING SENATOR/OFFICER (President of the Senate, Secretary of the Senate, Sergeant at Arms, Secretary for the Majority, Secretary for the Minority, and Chaplain):

Senator Bob Casey

(Print Senator's/Officer's Name)

hereby authorize

Kristen Gentile

(Print Traveler's Name)

I am an employee under my direct supervision, to accept payment or reimbursement for necessary transportation, lodging, and related expenses for travel to the event described above. I have determined that this travel is in connection with his or her duties as a Senate employee or an officeholder, and will not create the appearance that he or she is using public office for private gain.

I have also determined that the attendance of the employee's spouse or child is appropriate to assist in the representation of the Senate. (signify "yes" by checking box) ☐

8/10/17
(Date)

Bob Casey
(Signature of Supervising Senator/Officer)

PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should **NOT** submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee **MUST** also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

-
1. Sponsor(s) of the trip (please list all sponsors): The Pew Charitable Trusts
 2. Description of the trip: Senate Chiefs of Staff Management and Leadership Conference
 3. Dates of travel: September 15-17, 2017
 4. Place of travel: Richmond, VA
 5. Name and title of Senate invitees: Chiefs of Staff (see attached list)
 6. I *certify* that the trip fits one of the following categories:
☐ (A) The sponsor(s) are not registered lobbyists or agents of a foreign principal **and** do not retain or employ registered lobbyists or agents of a foreign principal **and** no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.
– OR –
☒ (B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (*see question 9*).
 7. ☒ I *certify* that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
– AND –
☒ I *certify* that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
 8. I *certify* that:
☒ The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for *de minimis* lobbyist involvement.
– AND –
☒ The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (*see question 9*).

9. **USE ONLY IF YOU CHECKED QUESTION 6(B)**

I *certify* that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:

☐ (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip.

– OR –

☐ (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip (*see questions 6 and 10*).

– OR –

☒ (C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

10. **USE ONLY IF YOU CHECKED QUESTION 9(B)**

If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:

11. ☒ An itinerary for the trip is attached to this form. I *certify* that the attached itinerary is a detailed (hour-by-hour), complete, and final itinerary for the trip.

12. Briefly describe the role of each sponsor in organizing and conducting the trip:

The Pew Charitable Trusts is the sole organizer and sponsor of this trip.

13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:

See attachment.

14. Briefly describe each sponsor's prior history of sponsoring congressional trips:

See attachment.

15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):

See attachment.

16. Total Expenses for Each Participant:

| | Transportation Expenses | Lodging Expenses | Meal Expenses | Other Expenses |
|---|------------------------------|------------------|---------------|----------------|
| <input checked="" type="checkbox"/> Good Faith estimate | \$73.57/roundtrip | \$286 | \$128 | |
| <input type="checkbox"/> Actual Amounts | \$44.51/local transportation | | | |

17. State whether a) the trip involves an event that is arranged or organized *without regard* to congressional participation or b) the trip involves an event that is arranged or organized *specifically with regard* to congressional participation:

This trip has been arranged specifically with regard to congressional participation.

18. Reason for selecting the location of the event or trip

Richmond was selected due to its close proximity to Washington, DC and its historical significance.

19. Name and location of hotel or other lodging facility:

The Jefferson Hotel, 101 W. Franklin Street, Richmond, VA 23220

20. Reason(s) for selecting hotel or other lodging facility:

The Jefferson Hotel can provide the necessary meeting space for the planned seminars and can provide the required number of guest rooms to accommodate the group.

21. Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:

Lodging and meals are at the per diem rate for Richmond, VA.

22. Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:

Transportation to Richmond will be provided via Amtrak using the lowest coach fare. Transportation back to Washington, DC, will be via coach bus.

23. ☒ I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).

24. List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:

N/A

25. I hereby *certify* that the information contained herein is true, complete and correct. (You must include the completed signature block below for each travel sponsor.):

Signature of Travel Sponsor: David W. Gilliland

Name and Title: David Gilliland, Officer

Name of Organization: The Pew Charitable Trusts

Address: 901 E Street, NW, 10th Floor, Washington, DC, 20004

Telephone Number: (202) 552-2145

Fax Number: (202) 552-2299

E-mail Address: dgilliland@pewtrusts.org



Bipartisan Senate Chiefs of Staff Conference

Richmond, Virginia | September 15-17, 2017



Conference Schedule

Friday, September 15, 2017

- 2:30pm Depart Union Station via Amtrak 95 (coach fare)
- 5:15pm Arrive Main Street Station, Richmond
- 5:30pm Travel via bus to Jefferson Hotel, 101 W. Franklin Street
- 5:40pm Arrive Jefferson Hotel, check in (GSA per diem rate)
- 7:30-9:30pm Dinner with keynote speaker **Historian Alexander Rose**, author of *Washington's Spies: The Story of America's First Spy Ring* (now the TV show "Turn: Washington's Spies"). Review agenda and goals of conference. (Empire Room)

Saturday, September 16, 2017

- 8:30-9:30am Breakfast at your leisure, Jefferson Hotel (Rotunda)
- 9:30-11:30am **Breakthrough Communication: Navigating High-Stakes Conversations, Peter and Susan Glaser**
Communication skills are the first step in developing strong relationships, making quality decisions, and creating high performance teams. But, most importantly, communication can serve as a tool to constructively manage conflict. This training is rooted in the Glasers' 39 years of field-tested and published research on interpersonal communication and leadership development. Participants learn communication models to understand and transform high-stakes conversations into a powerful and effective stimulus for change. (Grand Ballroom)
- 11:30am-12:00pm Break
- 12:00-1:15pm Lunch with speaker **Larry Sabato**, the University of Virginia. (Ginter Gallery)
- 1:15-2:30pm **State of the News Media, Amy Mitchell, Pew Research Center**
Eight years after the Great Recession sent the U.S. newspaper industry into a tailspin, the pressures facing America's newsrooms have intensified to nothing less than a reorganization of the industry itself, one that impacts the experiences of even those news consumers unaware of the tectonic shifts taking place. Amy Mitchell will brief chiefs on the annual "State of the News Media" report and its implications on public policy. (Grand Ballroom)

List of invited staff for

Management and Leadership Retreat

Richmond, VA

September 15-17, 2017

Sponsored by The Pew Charitable Trusts

| Senator | State | First | Last |
|--------------|-------|----------|-----------|
| Alexander | TN | David | Cleary |
| Baldwin | WI | Bill | Murat |
| Barrasso | WY | Dan | Kunsman |
| Bennet | CO | Jonathan | Davidson |
| Blumenthal | CT | Laurie | Rubiner |
| Blunt | MO | Stacy | McBride |
| Booker | NJ | Matt | Klapper |
| Boozman | AR | Helen | Tolar |
| Brown | OH | Sarah | Benzing |
| Burr | NC | Dean | Myers |
| Cantwell | WA | Travis | Lumpkin |
| Capito | WV | Joel | Brubaker |
| Cardin | MD | Chris | Lynch |
| Carper | DE | Bill | Ghent |
| Casey | PA | Kristen | Gentile |
| Cassidy | LA | James | Quinn |
| Cochran | MS | Brad | White |
| Collins | ME | Steve | Abbott |
| Coons | DE | Adam | Bramwell |
| Corker | TN | Todd | Womack |
| Cornyn | TX | Beth | Jafari |
| Cornyn | TX | Monica | Popp |
| Cortez Masto | NV | Scott | Fairchild |
| Cotton | AR | Doug | Coutts |
| Crapo | ID | Susan | Wheeler |
| Cruz | TX | David | Polyansky |
| Daines | MT | Jason | Thielman |
| Donnelly | IN | Joel | Elliott |
| Duckworth | IL | Kaitlin | Fahey |
| Duckworth | IL | Kalina | Bakalov |
| Durbin | IL | Patrick | Souders |
| Enzi | WY | Tara | Shaw |
| Ernst | IA | Lisa | Goeas |
| Feinstein | CA | Steve | Haro |
| Fischer | NE | Joe | Hack |
| Flake | AZ | Chandler | Morse |

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|------------|--|----|---------|---------------|
| Franken | | MN | Jeff | Lomonaco |
| Gardner | | CO | Natalie | Rogers |
| Gillibrand | | NY | Jess | Fassler |
| Graham | | SC | Richard | Perry |
| Grassley | | IA | Jill | Kozeny |
| Harris | | CA | Nathan | Barankin |
| Hassan | | NH | Marc | Goldberg |
| Hatch | | UT | Matt | Sandgren |
| Heinrich | | NM | Joe | Britton |
| Heitkamp | | ND | Tessa | Gould |
| Heller | | NV | Mac | Abrams |
| Hirono | | HI | Betsy | Lin |
| Hoeven | | ND | Ryan | Bernstein |
| Inhofe | | OK | Luke | Holland |
| Isakson | | GA | Joan | Kirchner Carr |
| Johnson | | WI | Tony | Blando |
| Kaine | | VA | Mike | Henry |
| Kennedy | | LA | Preston | Robinson |
| King | | ME | Kay | Rand |
| Klobuchar | | MN | Brigit | Helgen |
| Lankford | | OK | Greg | Slavonic |
| Leahy | | VT | JP | Dowd |
| Lee | | UT | Allyson | Bell |
| Manchin | | WV | Pat | Hayes |
| Markey | | MA | Paul | Tencher |
| McCain | | AZ | Truman | Anderson |
| McCaskill | | MO | Julie | Dwyer |
| McConnell | | KY | Phil | Maxson |
| McConnell | | KY | Sharon | Soderstrom |
| Menendez | | NJ | Fred | Turner |
| Merkley | | OR | Michael | Zamore |
| Moran | | KS | Brennen | Britton |
| Murkowski | | AK | Mike | Pawlowski |
| Murphy | | CT | Allison | Herwitt |
| Murray | | WA | Mike | Spahn |
| Nelson | | FL | Susie | Perez Quinn |
| Paul | | KY | William | Henderson |
| Perdue | | GA | Derrick | Dickey |
| Peters | | MI | Eric | Feldman |
| Portman | | OH | Mark | Isakowitz |
| Reed | | RI | Neil | Campbell |
| Risch | | ID | John | Sandy |
| Roberts | | KS | Jackie | Cottrell |

| | | | | |
|------------|--|----|-------------|----------------|
| Rounds | | SD | Rob | Skjonsberg |
| Rubio | | FL | Clint | Reed |
| Sanders | | VT | Michaelleen | Crowell |
| Sasse | | NE | Raymond | Sass |
| Schatz | | HI | Andrew | Winer |
| Schumer | | NY | Mike | Lynch |
| Schumer | | NY | Erin | Vaughn |
| Scott | | SC | Jennifer | DeCasper |
| Shaheen | | NH | Maura | Keefe |
| Shelby | | AL | Katie | Britt |
| Stabenow | | MI | Matt | VanKuiken |
| Strange | | AL | Kevin | Turner |
| Sullivan | | AK | Joe | Balash |
| Tester | | MT | Aaron | Murphy |
| Thune | | SD | Ryan | Nelson |
| Tillis | | NC | Jordan | Shaw |
| Toomey | | PA | Dan | Brandt |
| Udall | | NM | Bianca | Ortiz Wertheim |
| Van Hollen | | MD | Karen | Robb |
| Warner | | VA | Mike | Harney |
| Warren | | MA | Dan | Geldon |
| Whitehouse | | RI | Sam | Goodstein |
| Wicker | | MS | Michelle | Richardson |
| Wyden | | OR | Jeff | Michels |
| Young | | IN | John | Connell |



Bipartisan Senate Chiefs of Staff Retreat

The Pew Charitable Trusts

Invites You and Your Spouse
To the 6th Biennial

Senate Chiefs of Staff Management and Leadership Retreat

Richmond, Virginia
September 15-17, 2017

The Pew Charitable Trusts will host a retreat for the Senate Chiefs of Staff from September 15-17, 2017, in Richmond, Virginia. It promises to be an engaging weekend where you can learn from some of the most interesting speakers on management, leadership, and civility today. A copy of the draft agenda is attached.

We will depart Union Station on Friday, September 15, at 2:30 p.m., on a reserved Amtrak car and return via bus on Sunday, September 17, arriving back at the Capitol at approximately 2:15 p.m. Chiefs' expenses (minus alcohol and entertainment) are covered by The Pew Charitable Trusts. If you wish to invite your spouse, you may reimburse Pew for those expenses (estimated at around \$250).

Please [click here](#) to register, and we look forward to seeing you in historic Richmond this fall!

Tamera Luzzatto
Senior Vice President, Government Relations
The Pew Charitable Trusts
tluzzatto@pewtrusts.org
(202) 540-6501

The Pew Charitable Trusts makes every effort to comply with federal, state, and local government ethics rules, including when hosting events. Please make sure that your participation is consistent with applicable ethics rules.

The Pew Charitable Trusts
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THE PEW CHARITABLE TRUSTS



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